

Lead Scoring Sales Handoff Checklist

Domain Methods

Purpose: decide whether a lead score is ready to change sales behavior, or whether it should stay in review while the workflow gets safer.

1. Name the target decision

- Score or segment being reviewed:
- Current owner of the score:
- The sales behavior this score may change:
 - Rep prioritization Routing Alerting SLA timer
 - Manager review Pipeline reporting only
- One sentence rule: This score will change _____.

2. Check whether reps can understand the score

For each scored account, reps should see more than a number.

- What product, fit, intent, or lifecycle signal moved the score?
- How fresh is the signal?
- What action should the rep take next?
- Where should the rep flag a bad score?

If the score cannot answer those questions in the CRM or sales workspace, keep it out of automated routing until the handoff context is fixed.

3. Use now / not yet / proof needed

Use now:

- Rep queue prioritization for one segment or motion.
- Manager review of high-intent accounts.
- CRM or Slack alerts with clear next action and expiration.

Not yet:

- Automatic territory reassignment across the whole business.
- Compensation, quota credit, or sourced-pipeline claims.
- SLA penalties before false-positive review is complete.

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Proof needed before escalation:

- Stable source fields and product events.
- Named owner for score logic, CRM sync, routing rules, and exceptions.
- Reviewed false positives and false negatives from real sales examples.
- Agreement on what sales, marketing, RevOps, and data will change next.

4. Source and ownership check

Fill this before the score affects live sales motion.

- Product events owner:
- CRM field owner:
- Warehouse/model owner:
- Routing/SLA owner:
- Exception and fallback owner:
- Weekly review owner:

Warning signs:

- Reps only see a score with no reason.
- Bad examples are debated in Slack but not captured in the system.
- Nobody owns duplicates, stale lifecycle stages, or account matching.
- The score is asked to support pipeline or compensation before it has earned that authority.

5. Feedback loop

- Where will reps flag a bad score?
- Who reviews those examples?
- How often will the review happen?
- What change happens when the pattern is real?
- What decision will remain unchanged until the next review?

Next step if the score is ready: Data Activation.

Next step if the inputs or workflow are not ready: AI Readiness Audit or Data Foundation.